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A Summary of Current Programs 9/30/65

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and Preliminary Report of Progress

for 10/1/64 to 9/30/65

FOREIGN REGIONAL ANALYSIS DIVISION

of the

ECONOMIC RESEARCH SERVICE

UNITED STATES DEPARTMENT OF AGRICULTURE

and related work of the

STATE AGRICULTURAL EXPERIMENT STATIONS

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This progress report is primarily a tool for use of scientists and administrators in program coordination, development and evaluation; and for use of advisory committees in program review and development of recommendations for future research programs.

The summaries of research progress include a brief description of the work performed by foreign research institutions under direction of the Division with Section 104(a) of Title I, P.L. 480 funds, and contractual work performed for the Division by Land-Grant Universities and other institutions or persons.

The summaries of progress on U.S.D.A. and research-contractor activities include some tentative results that cannot be confirmed until the research has further progressed. Such findings, when adequately confirmed will be released promptly through established channels. Because of this, the report is not intended for publication and should not be referred to in literature citations. Copies are distributed only to members of Department staff, advisory committee members and others having a special interest in the development of public agricultural research programs.

This report **also** includes a list of publications reporting results of U.S.D.A. and cooperative research issued between October 1, 1964 and September 30, 1965. This progress report was compiled in the Foreign Regional Analysis Division, Economic Research Service, U.S. Department of Agriculture, Washington, D.C. 20250.

UNITED STATES DEPARTMENT OF AGRICULTURE
Washington, D.C.
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INTRODUCTION

The Foreign Regional Analysis Division is one of two research divisions of the Economic Research Service which works in the foreign field. Its function, through basic and applied research, is to analyze effects of world, regional, and country developments and trends in agricultural production, consumption, and trade to disclose opportunities for developing new markets and maintaining and expanding existing markets for U.S. farm products.

The regular work of the Division involves a Washington staff of 44 professional economists plus 7 supervisors who perform economic and statistical analysis work in Washington, travel abroad and gather data not available through other channels, and who plan, negotiate, and direct the execution of research contracts, most of which are with foreign-research institutions. The research covers the following three areas: 1) long-range outlook for U.S. farm exports; 2) foreign competition and demand by country and region; and 3) quantitative evaluation of foreign production, utilization and trade in farm products.

PROGRAM SUMMARY

Long-range outlook for U.S. farm exports. The analysis work on the long-range outlook for U.S. farm exports is divided into three parts, (a) the world food budget, (b) projections of exports of leading U.S. agricultural commodities, and (c) long-term projections of foreign supply and demand by country and region.

Research in the area of the world food budget was undertaken in 1961 at the request of a White House task force. The first report was published in October 1961. This study was updated to 1968 and was completely revised in the past year with projections to 1970. These studies provide a comprehensive summary of world food needs and help guide U.S. agricultural operations, including export activities under the Food for Peace program.

Annually, exports of U.S. agricultural commodities are projected for 5 years ahead, as part of an ERS study on demand, price and income projections for U.S. agriculture. Projections are made by major commodities, value and quantity, to our major markets and for all commodities to all foreign markets.

Foreign supply and demand studies are completed or underway in 30 countries that are important or potential export markets for U.S. farm products. Funds are available for three additional studies. Major country studies will need to be kept up-to-date as substantial changes occur in the supply and demand conditions in each country. During the past year a contract was negotiated to update the United Kingdom study. It is also planned to update previous studies in Nigeria and India. These studies will be integrated to give projections by region and for the world. A major step in the work involves an analysis of country studies to assess the effect of the long-range trends on prospective U.S. exports.

Foreign competition and demand, by country and region. This work involves the study and evaluation of developments in the economies of foreign countries, as they affect demand and competition in markets for U.S. farm products.

There is a continued growing volume of requests for information on foreign competition and demand and the implications for U.S. agricultural exports. The farm organizations, the farm press, marketing organizations, agricultural export interests, and government agencies seek data on the opportunities for developing new markets abroad and for maintaining and expanding existing foreign markets, and the nature of competition to be encountered in these markets.

Included are: (a) appraisal of the current food and agricultural situation in major importing and exporting countries; (b) evaluation of government measures taken to protect domestic agriculture from imports, to support prices, and to increase incomes of agricultural producers in foreign countries; (c) analysis of opportunities for U.S. agricultural exports in foreign markets associated with changes in agricultural productivity and cost-price relationships, increased public and private investment in agriculture, progress in the application of improved farming techniques, changes in the agrarian structure, and improvements in market organization and practices; and (d) assessment of the competitive position of U.S. farm products in foreign markets, including an evaluation of the effectiveness of U.S. market development and promotion projects.

Two studies have a world-wide coverage. One is a world agricultural situation report published annually in early January. This is supplemented by 5 regional situation publications. The other is a report on agricultural policies of foreign governments, published at 5-year intervals. The most recent was published in March 1964. Other research on competition and demand is organized and carried out by the 5 regional branches. Studies are made of the situation in respective countries or specific areas of foreign competition and demand, with extensive visits to the areas and markets to collect the required data. The findings are published as separate foreign agricultural economic reports and as articles on regions and countries.

There is close cooperation between the Foreign Regional Analysis Division and the Foreign Development and Trade Division, and between ERS and FAS in this area to preclude duplication or overlapping of work. The work of this Division involves the making of analyses by country or commodity, while that of FDT involves the economic analysis of a given problem, regardless of country or commodity. The work of the Foreign Regional Analysis Division involves longer-term comparisons and analyses in greater depth than studies are carried out in FAS for current operational purposes. In addition to its own resources, ERS utilizes the services of Land-Grant Colleges and Universities and other economic and marketing research organizations or individuals to perform portions of the research on the: (1) effectiveness of U.S. market development and promotion projects in foreign countries; (2) market potential in certain countries; and (3) opportunities and problems for U.S. farm exports resulting from common market developments in Western Europe and other areas. P.L. 480 funds are used to cover travel and other costs abroad. Some foreign market appraisal work performed in the U.S. (about 1 man-year in FY 1964) has been contracted for with agricultural colleges or other institutions.

Quantitative evaluation of foreign production, utilization and trade in farm products. This continuing work project provides the basic data for improving the quality of foreign agricultural production, consumption, and trade statistics. Its function is to: (a) construct annual food and agricultural production indices by country, region, and for the world; (b) construct food balances, bringing together in one table for each country data on available food supplies and their utilization by categories; and (c) compile and analyze data on agricultural trade in geographic areas where trade statistics are of special significance to U.S. export prospects, or where official data are inadequate and to promote uniformity and comparability in tables of trade statistics for foreign countries used in publications of the Division.

Statistics for many countries are incomplete, inconsistent, or otherwise unreliable. Critical analyses are, therefore, made of data currently available, and appropriate measures are taken with foreign countries to broaden the coverage and improve the quality of data needed by U.S. exporters of farm products, for foreign policy formulation, and for administration of U.S. Government export and foreign aid programs. Foreign market research studies in certain underdeveloped countries are being undertaken for the purpose of improving the basic data needed for market development.

Related research work for other Federal agencies. The Foreign Regional Analysis Division is reimbursed or receives advances for research work done for the: Central Intelligence Agency, Agency for International Development, and Foreign Agricultural Service.

For CIA the Division prepares annually 8 major monographs on the agricultural resources, production, consumption, trade and institutions of selected countries. The equivalent of 9 professional employees devote full time to CIA work.

For AID the Division prepares annually certain index numbers of production and renders certain technical and consultative services to which are devoted in total 3 professional man-years. The Division has recently completed special crop production indices, in connection with a productivity study which the Foreign Development and Trade Division is doing for AID. It is now working on livestock indices for the same study. This work involves 2 professional man-years.

The advances from FAS are used by the Division for foreign travel to supervise and otherwise administer the research contracts in foreign countries financed under Section 104(a) of Title I, P.L. 480.

AREA NO. 1 - LONG-RANGE OUTLOOK FOR U.S. FARM EXPORTS

Problem. Since United States agricultural output is greatly in excess of domestic needs, new export possibilities for farm products have become increasingly important to the agricultural industry and the national economy. Developments in the areas of production technology and management indicate that U.S. farmers will continue for the foreseeable future to produce increasing quantities and a widening range of products for export.

Knowledge of demand-supply trends and new opportunities for U.S. farm exports, arising from economic changes in both the more advanced and the developing countries, is essential if the United States is to develop its farm exports to the fullest extent consistent with the economic utilization of U.S. agricultural resources.

Record exports of U.S. farm products, valued at more than \$6.1 billion in FY 1965, contribute substantially to the income of U.S. agriculture and industries engaged in processing and merchandizing farm products. They are also an important element in foreign exchange earnings and, therefore, in the vital balance of payments situation of the United States.

USDA PROGRAM

The Department has a long-term program for projecting the future foreign supply, demand, and trade of selected farm products. The total program involves 17 professional man-years annually in the Department of Agriculture to perform economic research in Washington and also to develop and supervise research programs abroad performed by research institutions on a contract basis under Section 104(a) of Title I, P.L. 480.

The first part of the program is the development of a world food budget, which measures the requirement for food in the future against the availability of food. Research on the world food budget was initiated in February 1961 at the request of the Secretary of Agriculture, as the first step in a program to expand consumption of agricultural products abroad and to help provide an adequate diet for the world's people. This study was completely revised during 1964. This research provides a comprehensive summary of world food needs and helps to guide U.S. agricultural operations, including export activities under the Food for Peace program. It highlights the opportunity for using food abundance in helping build self-sustaining economies in less developed countries. It is also helpful in planning market development programs to expand commercial markets for U.S. farm products. An interagency task force report, soon to be released, proposes an expanded program of food aid and agricultural development for the less developed countries. These recommendations are based upon the finding of the World Food Budget, 1970. Work involved in the second part of the program is the annual projection of exports of leading U.S. agricultural commodities by quantity and value. This work is related to that of economic analysts in the Department working on U.S. agricultural output and availabilities for export. Together they provide the long-range outlook for U.S. farm commodities. This

work includes projections based upon various assumptions as to prices of leading U.S. products in the world market. It is entirely performed in Washington by the Department of Agriculture with departmental personnel.

Work in the third part deals with long-term projections of foreign supply and demand. This involves contracting with competent research organizations for comprehensive country studies to analyze and project ahead to 1970 and 1975, more recent studies look ahead to 1980, at the import demand or export availability of agricultural products which are important U.S. export commodities. The Division plans and supervises the studies, reviews and analyzes the results, and interprets the findings for U.S. agriculture. Preparations are underway for combining the results of these country studies into projections for major regions and for the world. The actual performance of the research within foreign countries is carried out by research-contractors who are paid with foreign currency generated from exports under Title I of P.L. 480. Country supply and demand contract studies underway during this reporting period involved 64 professional man-years.

PROGRAM OF THE STATE AGRICULTURAL EXPERIMENT STATIONS

The State experiment stations depend considerably upon the USDA for the statistics needed for their foreign market research. Also they find agricultural attache reports and special reports very useful. Beginning this year, the research of the State Agricultural Experimentation Stations being carried out under area 1 will not be included in this report.

PROGRESS IN USDA AND FOREIGN RESEARCH CONTRACTORS' PROGRAMS

I. The World Food Budget

A. The World Food Budget, 1970 - This report--published October 15, 1964--presents the results of an expanded effort to study the supply and utilization of food commodities for the countries of the world, assess world food needs, and evaluate the problems and possibilities of closing the food gap. A comprehensive analysis was made of the food situation in 92 countries during 1959-61 and projections were made to 1970.

Soon after the World Food Budget was released, the Secretary of Agriculture, in cooperation with the Administrator of AID and the Director of the Budget, set up an Interagency Task Force to study in more detail the food requirements of aid-recipient countries in 1970, 1975, and 1980, and to propose alternative actions whereby these food requirements may be met. The Task Force concluded that current trends in food production in the less developed countries are not adequate to meet rising demands of food resulting from rapidly growing populations and some improvement in per capita income. Faster growth in income is necessary to meet the goal of the free world. This will be accompanied by greater demand for food which, in large measure, must be met by accelerated food production.

II. Projections of U.S. Agricultural Exports

Several projections of U.S. agricultural exports have been done in answer to specific requests. In 1962, ERS embarked on an annual program to project for 5 years ahead the domestic demand for farm products, international trade, farm outlook and resource use, supply-demand balance and stocks, farm prices, and farmers income. This Division is responsible for the international trade projections in the project.

In connection with The World Food Budget, 1970, projections were made for U.S. exports of major food commodities or groups of commodities to 18 regions of destination. These projections were reviewed and revised this past year and projections to 1980 were made for major commodities. The export projections are included in A Look Ahead for Food and Agriculture.

III. Long-term Projections of Supply and Demand

Utilizing Section 104(a), Title I, P.L. 480 funds, the basic country studies are carried out under contract by research organizations that command the requisite facilities and familiarity with the problems to be studied, usually an organization in the country itself. Negotiation of the contract includes agreement on a Plan of Work which becomes an integral part of the contract and aids in keeping the various country studies in line with the general framework previously developed. Required progress reports are reviewed and analyzed. Consultations on problems are held from time to time with research workers in the contracting agency. Cost of the studies varies widely, depending on the availability and reliability of data and the extent to which the data can be utilized for time series, cross-sectional and other projectional analysis. Time involved with studies varies from 18 to 36 months.

Over the period of August 1958 to September 30, 1965, contracts have been signed for studies in 30 countries; 9 in Europe--the United Kingdom, Italy, West Germany, Netherlands, Austria, Spain, France, Belgium, and Denmark; 7 in the Far East and Oceania--India, Philippines, Japan, Pakistan, Hong Kong, Malaysia, and Australia; 7 in Latin America--Brazil, Columbia, Chile, Venezuela, Mexico, Peru, and West Indies; and 7 in Africa and Western Asia--Nigeria, Ghana, Israel, Saudi Arabia, UAR (Egypt), Turkey, and Republic of South Africa. Three more studies are planned: Argentina, Central America, and Iran. Studies will be updated for some of the major countries. Preparations are already under way for combining the results of these country studies into projections for the major regions and for the world.

Nine studies have been published, six more have been completed and are in the process of publication. As each of these reports is published, largely as submitted by the contractor, another document is prepared by the Foreign Regional Analysis Division which summarizes, analyzes, and evaluates the results of the study and spells out the implications for U.S. agriculture.

A. Studies published: 10/1/64 to 9/30/65

1. Ghana: Projected Level of Demand, Supply, and Imports of Agricultural Products in 1965, 1970, and 1975. The contractor was the Department of Political Economy, University of Edinburgh, Scotland. Mr. Ian G. Stewart, Reader in Economics was responsible for general supervision of the study. The report was published in May 1965.

The contractor projects Ghana's population by 1975 at 10.3 million, an annual average growth rate of 2.9 percent. Per capita income is projected to increase from \$195 in 1960 to \$250 in 1970 and \$270 in 1975. A decrease in import requirements in 1975 over the 1962 level is projected for rice and tobacco and an increase for wheat, meat, and dairy products.

2. West Indies Federation "Area" and British Guiana: This report contains long-range projections of agricultural supply and demand for the old West Indies area and British Guiana. The contractor was the Institute of Social and Economic Research of the University College of the West Indies, Mona, Jamaica. The research leader was Dr. H. D. Huggins, the Director of the Institute. The study was published in Israel and issued in March, 1965. The area's population and food requirements are expected to increase substantially through 1975. Per capita national income gains were projected at an average annual rate of 2.9 percent for the same period. With agricultural production likely to lag behind rising demand, sharp import gains were projected. Largest gains were indicated for wheat and wheat flour, coarse grains, vegetables, pulses, meat, cotton, and tobacco.

B. Studies completed: 10/1/64 to 9/30/65

1. France: Production and Uses of Selected Farm Products in France. A projection 1960 to 1975. The contractor was the Centre de Recherches et de Documentation sur la Consommation (CREDOC), Director, G. Rottier. Copies of the final report were received in May 1965 and are being reviewed. A summary report is being prepared.

The study indicates that France will rapidly expand its production of grain with a greater surplus for export. Production and exports of beef, pork, poultry, apples, and pears will also increase. However, imports of oilseeds, vegetable oils, oil cake, and tobacco probably will increase.

2. Malaysia: Long-term Projections of the Supply of and Demand for Agricultural Products. The contractor was the National Planning Association, Washington, D.C. The Director is Dr. D. S. Paauw. Review draft of the final report was received July 1965. Final revisions in the manuscript are being completed.

The Gross National Product of Malaysia is assumed to increase at 5 percent per year over the projected period, reaching \$US 5,821 million in 1975. Total population is expected to grow at an annual rate of approximately 3 percent, exceeding 10.7 million by 1975. Private consumption expenditures are assumed to increase at a minimum annual rate of 4.5 percent (current values), and final

consumption of agricultural products is projected to increase significantly. Much of this expansion will be supplied by increased imports, especially of fruits, meats, dairy products and wheat and flour. On the other hand, much of the projected increase in the final consumption of rice is estimated to be met by projected increases in domestic production.

3. Pakistan: Long-term Projections of Supply of and Demand for Agricultural Products. The contractor was the Social Sciences Research Center, Lahore. The research director was **Muhammad** Khalid Hayat Khan. Review draft of the final report was received July 1965. Final alterations to the manuscript are being completed.

The GNP of Pakistan is projected to grow at an annual compound rate of 7.9 percent from 1965 to 1985. With an assumed population growth rate of 3.7 percent, GNP per capita will increase at the rate of 4.2 percent from \$76 in 1965 to \$170 in 1985. The growth rate in the agricultural sector is projected to be only 3.9 percent which will necessitate an upward trend in the import of many food commodities especially rice, wheat, and dairy products. The major agricultural export commodities that are expected to increase are fish, cotton, and jute.

4. Saudi Arabia: Long-term Projection of Supply of and Demand for Agricultural Products. The contractor was the Economic Research Institute, American University of Beirut, Lebanon. Edmond Y. Asfour was responsible for the overall direction of research and for writing the final report.

Major findings of the study indicate that published estimates of the population of Saudi Arabia at 6.4 million in 1962 have been about 100 percent too high; reconciliation of more reliable indicators point to a population of 3.2 million in 1962. GNP rose during the 1950's at an average rate of 14.5 percent per year, but will slow down over the years to a rate of about 5.5 percent per year by 1975. This is faster than population growth. Import needs for wheat and flour will increase from 92,000 tons in 1962 to 123,000 tons in 1975; those of rice, from 100,000 to 144,000; fresh fruits 30,000 to 94,000; sugar, 67,000 tons to 135,000 tons.

5. Spain: Long-term Projections of the Supply of and Demand for Agricultural Products in Spain. The contractor was the Comision Nacional de Productividad Agricola, Madrid, President, Sr. Andres Alvarez. Copies of the final report were received in August 1965 and is being reviewed. A summary report is being prepared.

The study projects Spain's GNP to more than double between 1960 and 1975. Population is expected to increase about 1 percent per year between 1960 and 1975. The structure of agriculture is expected to be substantially modified with livestock, fruit, and vegetable production becoming more important. While surplus production is projected for some commodities such as vegetables, fruits, and cotton, large deficits are forecast for feedgrains, edible oils, livestock products, and tobacco.

6. Venezuela: Long-range Projections of the Supply of and Demand for Agricultural Products. The contractor was the Consejo de Bienestar Rural, Caracas. Dr. Richardo Gonellas, Chief of Special Studies of the Organization was responsible for the study. The study has been completed and sent to Israel for publication.

Projections through 1975 indicate average annual gains of 3.0 percent for population, 4.3 percent for per capita national income, and rapidly increasing requirements for food and other agricultural products. Although significant agricultural production gains are expected, import requirements are projected at substantially higher levels for wheat, coarse grains, certain fats and oils, canned milk and cheese, beans, and seed potatoes.

C. Studies in progress: Stage of Completion 9/30/65

1. Australia: Long-term Projections of the Supply of and Demand for Agricultural Products. The contractor is Monash University, Clayton, Victoria, Australia. Director of the project is Mr. Fred H. Gruen. The contract period began May 6, 1964. The study is 75 percent completed.

2. Belgium: Long-term Projections of the Supply of and Demand for Agricultural Products. The contractor is Studiecentrum voor Economisch en Sociaal Onderzoek (SESIO), Antwerp. Dr. P. H. Virenque is director. The contract period began June 15, 1964 and extends for two years. The research is about one-half completed.

3. Brazil: Long-term Projections of the Supply of and Demand for Agricultural Products. The contract is with the Getulio Vargas Foundation, Rio de Janeiro. The study is under the direction of Dr. Julian M. Chacel, head of the Brazilian Institute of Economics of the Foundation. The contract was undertaken June 28, 1961. The study has been largely completed and the final report is under preparation.

4. Chile: Long-term Projections of the Supply of and Demand for Agricultural Products. The contractor is the Facultad de Ciencias Economicas y Sociales de la Universidad Catolica de Chile, Santiago. Mario Corbo of the Centro de Investigaciones Economicas of the Facultad is in charge of the study. The contract period began May 9, 1962. The study is three-fourths completed.

5. Colombia: Long-term Projections of the Supply of and Demand for Agricultural Products. The contract is with the Universidad de Los Andes, Bogota. Dr. Eduardo Wiesner D., director of the Centro de Estudios Sobre Desarrollo Economico of the University is in charge. The contract period began November 28, 1960. The report was submitted in November 1964 but returned to the contractor for extensive revisions.

6. Hong Kong: Long-term Projections of the Supply of and Demand for Agricultural Products. The contractor is the Chinese University, Kowloon, Hong Kong. The director of the project is Dr. Choh-Ming Li. The contract period began June 26, 1964. The study is 75 percent completed.

7. Mexico: Long-term Projections of the Supply of and Demand for Agricultural Products. Two groups working jointly are involved as contractors in the agreement: The Ministry of Agriculture and Livestock, United Mexican States; and Banco de Mexico, S.A. Joint directors of the project are Sr. Ing. Emilo Alania Patino and Sr. Victor Urquidi, both of the Bank. The contract period began June 28, 1962. The study is 90 percent completed.

8. Netherlands: Long-term Projections of the Supply of and Demand for Agricultural Products. The contractor is the Landbouw-Economisch Inst., Prof. dr. A. Kraal, Director. The contract period began June 26, 1962. The due date has been extended to December 31, 1965. Parts of the final draft are now being translated into English.

9. Peru: Long-term Projections of the Supply of and Demand for Agricultural Products. The contractor is the Universidad Agraria, Lima, Sr. Ing. Eduardo Watson C., is overall study director. The contract was effective December 1, 1962. The research is about two-thirds completed.

10. Republic of South Africa: Long-term Projections of Supply of and Demand for Agricultural Products. The contractor is Arthur D. Little, Inc., Cambridge, Massachusetts; Maurice Sorenson is the research director. The contract period began August 21, 1964; the research is about 50 percent completed.

11. Turkey: Long-term Projections of Supply and Demand for Agricultural Products. The contractor is Robert College, Istanbul. Dr. Peter Franck guided the research through the early months. The contract period began June 6, 1964; the research is approximately 60 percent completed.

12. United Arab Republic (Egypt): Long-term Projections of Supply of and Demand for Agricultural Products. The contract is with the Ministry of Agriculture, United Arab Republic, Cairo. The contract period began June 22, 1964; the research is less than 50 percent completed.

13. West Germany: Long-term Projections of the Supply of and Demand for Agricultural Products. The contractor is the IFO-Institut fur Wirtschaftsforschung, Munich, Federal Republic of Germany, Director, Dr. Gunter Zempel. The contract period began June 26, 1963. The due date has been extended to December 31, 1965. The research is about 90 percent completed.

D. Research contracts negotiated: 10/1/64 to 9/30/65

1. Denmark: Long-term Projections of the Supply of and Demand for Agricultural Products. The contract, for a period of 2½ years, was signed June 1965 with the Institute of Economics, University of Aarhus, Aarhus. Jorgen H. Gelting is director of the Institute.

2. United Kingdom: **Updating** and Extension of the Long-term Projections of the Supply of and Demand for Agricultural Products. This is the first long-term supply and demand study to be updated. The contractor is the University of Oxford. The contract was signed in June 1965 and extends for a period of 15 months.

E. Studies for which implications for U.S. agriculture have been analyzed. The Division makes summaries and evaluations of the supply and demand studies as they are completed. Such summaries include analyses and assessments of the competitive position of selected U.S. farm products in the countries studied and the probability of maintaining or increasing U.S. exports to them. Summaries and evaluations have been published for the United Kingdom, Austria, Italy, the Philippines, Nigeria, Israel, and India. Those on the West Indies Federation and Ghana have been completed and are in the process of publications. Analyses are in progress for Spain, France, Venezuela, Saudi Arabia, Japan, Pakistan, and Malaysia with summaries planned for this fiscal year.

PUBLICATIONS REPORTING RESULTS OF U.S.D.A. AND FOREIGN RESEARCH CONTRACTORS

Anderson, Wilhelm, Director, Foreign Regional Analysis Division, Economic Research Service. The World Food Budget, 1970, 1964. U.S. Dept. Agr. Foreign Agricultural Economic Report No. 19, 105 pages.

Huggins, H.D., Director. Jamaica, Trinidad and Tobago, Leeward Islands, Windward Islands, Barbados, and British Guiana: Projected Levels of Demand, Supply, and Imports of Agricultural Products to 1975, 1965. U.S. Dept. Agr. ERS-Foreign 94, 221 pages.

Moe, Lyle E. Israel: Supply and Demand Projections for Agricultural Commodities to 1975, 1965. U.S. Dept. Agr. ERS-Foreign 137, 41 pages.

Moe, Lyle E. Nigeria: Projected Level of Demand, Supply, and Imports of Farm Products in 1965 and 1975, with Implications for U.S. Agriculture, 1964. U.S. Dept. Agr. ERS-Foreign 105, 15 pages.

Pike, Clarence E.: Supply of and Demand for Selected Agricultural Products in India - Projection to 1975/76, 1965. U.S. Dept. Agr. ERS-Foreign 100, 27 pages.

Stewart, Ian G. et al. Ghana: Projected Level of Demand, Supply, and Imports of Agricultural Products in 1965, 1970, and 1975, 1965. U.S. Dept. Agr. Economic Research Service, 120 pages.

AREA NO. 2 - FOREIGN COMPETITION AND DEMAND BY COUNTRY AND REGION

Problem. In many foreign markets United States farm products are facing a change in the competition or demand situation that directly affect their sale. There is a growing volume of requests for information on foreign competition and demand arising from political and economic developments abroad. The problem is to provide an appraisal of developments by country and region in agriculture and in the overall economies of foreign countries in order that American farmers, agricultural export interests and governmental agencies may take advantage of opportunities for developing new and maintaining or expanding existing foreign markets for U.S. farm products.

USDA PROGRAM

In line with the need and growing volume of requests for information on foreign competition and demand, the USDA maintains a continuing program to obtain, appraise and disseminate information in this area. In the period covered, this work has required 16 professional man-years annually in Washington, and contracts for research averaging about 1 professional man-year annually.

This program includes: 1) appraisals of the current food and agricultural situation in more than 100 countries and the outlook for the demand for and supply of farm products in the year ahead; 2) evaluation of the trends and effects on competition and demand of government measures taken to protect agriculture and support prices and incomes of agricultural producers in more than 100 foreign countries, including measures taken or proposed by the European Economic Community or Common Market, the Latin American Free Trade Association, Central American Free Trade Association, and other groups of countries moving toward economic integration or granting preferential treatment to each other; 3) analysis and interpretation of the opportunities and problems for U.S. agriculture associated with changing production and trade patterns in foreign markets and competitor countries, caused by changes in agricultural productivity and cost-price relationships resulting from increased public and private investment in agriculture, progress in the application of improved farming techniques, changes in the agrarian structure, and improvements in market organization and practice as well as changes in policy measures; 4) assessment of the competitive strengths and weaknesses of U.S. farm products in foreign markets as compared with products offered by farmers within that market and products available from other exporting countries, including evaluation of the effectiveness of market development and promotion projects; and 5) basic studies of the agricultural economies of foreign countries for use within the Department as background needed for judging a country's potential as a market for or competitor with U.S. agriculture, and also to supply other interested agencies, private organizations, and individuals with desired information on agriculture in foreign lands.

Economic research in the categories mentioned above is organized and carried out on a regional basis by 5 regional branches within the Foreign Regional Analysis Division, of the Economic Research Service, USDA. The branches develop their own regional programs of research peculiar to the general agricultural and economic situation of their regions. They maintain continuous reviews of

the competition-demand situation in their regions and publish results of their research on a country and regional basis, and on specific aspects of competition and demand. While performing most of this research with their own personnel in Washington they also gather information first-hand from travel in foreign countries, and they contract for and direct the performance of the limited amount of competition and demand analytical work carried out on a grant basis with State and other universities.

In addition to their own regional research programs the regional branches annually contribute sections to the World Food Situation; the World Agricultural Situation published by the Department early in January of each year; and beginning in 1963 they have prepared annual regional situation reports.

A continuing function in regard to regional research is to provide service to other Federal agencies. Among these services are: 1) assistance to Foreign Agricultural Service commodity divisions in the analysis and interpretation of various regulations relating to trade in agricultural commodities; 2) preparation of policy memoranda and speeches on agricultural and trade policy, and production and utilization of agricultural commodities; 3) participation in the briefing of marketing specialists, and other operating governmental and non-official personnel traveling to and from foreign countries; and 4) service on intra- and inter-departmental committees established to consider trade agreements and advise on the economic feasibility of proposed changes in tariff rates or non-tariff regulations. In addition Branch personnel attend conferences and meetings involving their respective areas to describe and interpret U.S. agricultural trade policies and programs and to present U.S. positions.

A. Western Hemisphere

The Western Hemisphere Branch research program on competition and demand covers Canada, Mexico, Caribbean countries, Central America, South America, and dependent territories and departments of the Hemisphere. The region represents an important and growing market for U.S. agricultural exports and the largest source of U.S. agricultural imports.

Continuing analysis of changes in the agricultural situation and policies of Western Hemisphere countries is carried on to evaluate the implications for U.S. agriculture. Basic studies are in progress or planned for important countries and regions to appraise their potential for imports of agricultural commodities and to assess the competitive position of U.S. farm products in those markets.

Hemisphere trends and developments affecting U.S. agriculture include: Rapid population growth in Latin America (is higher than any other comparable region in the world) generally offsetting economic gains; declining per capita output of agricultural and livestock production for Latin America; increased agricultural trade; and accelerating efforts to increase economic growth and agricultural development and trade for Latin America, including the Alliance for Progress, the Latin American Free Trade Association, the Central American Free Trade Area, and international commodity agreements.

B. Western Europe

The West European Branch has a continuing program of economic research on competition and demand covering 16 West European countries. The program is concerned with the analysis of factors affecting the market for U.S. agricultural products in Western Europe or in third countries where Europe is a competitor. This area is a market for around 40 percent of total U.S. agricultural exports and more than 50 percent of U.S. dollar agricultural exports.

Continuing analysis of the Common Market's agricultural policy, which is in process of development and implementation, is carried on in order to assess its likely future impact on total imports of farm products and on the share of those imports which the United States may expect to achieve.

To facilitate this work a project was initiated by the Branch to make a comprehensive survey of European agricultural economic studies of the EEC. This study uses foreign currencies under section 104(a) of P.L. 480 and is being conducted under contract by Oxford University. This project has made available a number of useful studies. It has been extended to March 1966.

C. Eastern Europe

The East European Branch has a continuing program of research on the USSR and other countries of Eastern Europe which are important to the U.S. both as competitors and in some recent years also as markets for agricultural products. Particular attention in the program is given to changes in agricultural production, utilization, and trade.

Agricultural production, domestic food consumption patterns, and foreign trade in agricultural commodities are controlled by the government in each of these countries. Therefore, much attention is given to government policy as it affects all phases of agriculture, especially the expansion of output, exports, and imports.

A number of highly significant changes have taken place in these countries in the past year or two which are having, and will continue to have, important implications for the United States. Major changes have taken place in political leadership, some older farm policies have been abandoned and new ones put forward, the supply of investment, machinery, fertilizer, and other inputs is undergoing significant increase. In addition the Soviet Union has become a major importer of grain, whereas traditionally that country was a major grain exporter. As a result, changes in the level of output and in the trade patterns of these countries not only individually but as a group may be expected. These questions are at present the major concern of the Branch.

D. Africa and the Middle East

The Africa and Middle East Branch carries on a continuing program of economic research on competition and demand for agricultural products within the whole of Africa and West Asia which comprise some 70 countries and territories.

Constant surveillance is given to the changing patterns of production and trade brought about by political, social, and economic developments.

In the current program of basic economic research are the Arabian Peninsula, South Africa, Eastern Africa, and Cyprus. An ERS-Foreign series bulletin will be issued on each of these, analyzing the present competition and demand situation with regard to agricultural products, and U.S. farm products in particular. In addition, a project concerned with patterns of agricultural trade for wide areas of Africa will analyze the changes in trade patterns associated with the tide of independence for countries in Africa.

E. Far East

The research of the Branch deals with a variety of situations. The Far East includes several countries in early stages of development having populations that are already large and dense and that are growing rapidly as well. They constitute the bulk of the world food problem. Research turns largely on the question of food needs rather than market prospects. Japan's agriculture, though highly developed, fails to meet the needs of the country. But as an advanced industrial nation, Japan is able to buy commercially abroad. It is in most years the leading foreign buyer of U.S. farm products. Research is concerned with changing patterns of consumption, growing import requirements, and competition from other suppliers. Australia and New Zealand, with advanced agricultural technologies, are more important as competitors than as markets. Though the U.S. does not trade with the countries of communist Asia, their trade concerns us from the standpoint of its effect on total world exports or imports of certain commodities. Studies here are more difficult because of the statistical blackout.

F. World Agricultural Situation

This is a continuing Division project in which the current world food and agricultural situation and outlook for a year ahead is analyzed with respect to production, supply, trade, price trends and other economic factors. The situation is also appraised with respect to major farm commodities and by regions. An analysis entitled "The World Food Situation" is published annually in the National Food Situation and a report on the World Agricultural Situation is published in the first week of January each year.

G. Agricultural Policies of Foreign Countries

Evaluation on an inter-regional and world basis of government measures taken to protect agriculture and to support prices and incomes of agricultural producers is a continuing Division project. It includes publication in the USDA Handbook Series as the occasion requires of Agricultural Policies of Foreign Governments and preparation of special reports on implications of particular policies of foreign governments affecting the production, trade or utilization of farm products. Such reports may be prepared for administrative use or for publication and general dissemination among persons or groups with farming or trade interests.

PROGRAM OF THE STATE AGRICULTURAL EXPERIMENT STATIONS

The states occasionally conduct research on foreign competition involving commodities of special importance to the state. One such project is concerned with competition from the Mexican West Coast in the production of vegetables. The study will determine the past and potential production trends in Mexico and costs of production there will be compared to domestic cost. Also, an effort will be made to determine the extent to which the U.S. market is available to Mexican exporters. Because of the implications to American producers, foreign trade questions relating to foreign investment and development will be investigated.

Approximately 0.6 professional man-years are being devoted to this research area.

PROGRESS IN USDA AND COOPERATIVE PROGRAMS

A. Western Hemisphere

Regional studies completed include the 1965 Western Hemisphere Agricultural Situation and Notes on the Agricultural Economies of Dependent Territories in the Western Hemisphere. Western Hemisphere agricultural output for 1964/65 was down significantly from record levels a year earlier. Total output was down for Canada, the United States and Latin America. But the region remained as the world's major agricultural supplier; however, farm exports continued at high levels because of large stocks of most of the commodities which registered declines in output. In contrast, the Hemisphere registered general gains in total economic output and growth in foreign exchange reserves in 1964. For dependent territories in the Hemisphere, recent economic uptrends coupled with increasing population pressures on agricultural resources indicate that this area will continue to be a growing market for temperate zone commodities, especially wheat and wheat flour and fruits and vegetables. Another regional publication, Notes on the Agricultural Economies of Countries of the Hemisphere, is nearing completion.

Country studies published or completed include Costa Rica and Peru. Costa Rica's trade with the United States has increased but declined in relative importance in recent years for both total and agricultural trade. However, the United States still supplies nearly half of the value of the country's agricultural imports, largely wheat flour, other grain preparations, poultry feed, dairy products, vegetable oils, and leaf tobacco. For Peru, agricultural imports from the United States have fluctuated considerably in recent years, from 13 to 38 percent of the value of annual imports in the period 1956-64. Principal U.S. agricultural exports to Peru are expected to continue to be wheat, fats and oils, variety meats, dried and processed fruits and vegetables, and manufactured tobaccos. Studies are underway for Argentina, Brazil, Mexico, and Panama.

A contract study was carried out this past year dealing with the market potential for feed grains in Canada with economic projections to 1970. Long-run trends in the Canadian economy in the period 1950-60 favoring the expansion of

the market for feedgrains have continued, but some short-run developments have partially offset the favorable factors. Average annual feedgrains, imports, virtually all corn from the United States, increased from 0.3 million short tons for 1948/49-1952/53 to 0.6 million tons for 1958/59-1962/63. Imports were projected at 1.2 million tons for 1970.

B. Western Europe

A comprehensive report was completed and published on the agricultural situation in 1964/65 in West European countries, reviewing the general economic situation, agricultural production, policy, inputs, farm size and low incomes, the food situation and foreign trade patterns of all countries in the region. In addition, articles in Foreign Agriculture reviewed various aspects of agriculture in Western Europe, the European Economic Community, France, West Germany, and the United Kingdom.

Manuscripts and articles completed or nearly completed but not published are: (1) An economic framework for Common Market countries; (2) A review and evaluation of the United Kingdom's agricultural support policy; (3) A study of the Italian livestock situation; (4) Portuguese plan for agriculture; and (5) Small farm problems in the United Kingdom. Research is also underway on the livestock-feed economy of Western Europe and the structure of agriculture in Western Europe.

The Branch is supervising two competition studies which are being done under contract: Grain Policies in France and Germany, by the Food Research Institute, Stanford University, California; and Production of and Trade Policies for Fruits and Vegetables in Italy, by the Giannini Foundation, University of California. Part of the research being done by the Food Research Institute has been published (see Food Research Institute Studies, Vol. IV, No. 3, 1964 "Determinants of French Grain Production, Past and Prospective;" and Vol. V, No. 1, 1965 "German Grain Policies and Prices: 1925-1964").

C. Eastern Europe

A comprehensive report on the agricultural situation in 1964-65 in the Soviet Union and other East European countries was the principal publication of the year. It reviewed production, agricultural policy, the food situation and foreign trade of all countries in the region. A major upset in political leadership in the Soviet Union which resulted in significant changes in Soviet agricultural policy and dramatic shifts in trade patterns were analyzed in detail.

A statistical comparison of U.S. and Soviet agriculture was updated for the Congressional Joint Economic Committee. Other publications of the Branch included U.S. and Russian Agriculture - A Statistical Comparison and Bulgaria's Agricultural Economy in Brief. A contract study is being carried out on Yugoslavia to evaluate the market potential for U.S. exports.

In view of the significant developments on the agricultural and food fronts in the USSR and the bloc countries, much time was devoted by members of the staff

to briefing the press and other media of communication on the agricultural situation in Eastern Europe, and in supplying information to the public, the Department, and other government agencies on the subject through correspondence, lectures and interviews. Current developments in East European agriculture were discussed in articles in Foreign Agriculture and The Farm Index.

Members of the Branch participated in, and presented papers at, the Conference on Soviet Agricultural and Peasant Affairs at the University of California in Santa Barbara.

D. Africa and the Middle East

Major regional studies have been completed in the period under review analyzing the changes in agricultural production and trade, appraising the potential for imports of farm products, and assessing the competitive position of the products of U.S. farms in North Africa and the Middle East.

Northern Africa's agricultural imports have increased 45 percent since 1955; U.S. agricultural exports to the area have increased nearly fourfold in the same period and reached a value of over \$400 million in 1963. The North African area imported 2.5 million tons of breadgrains in 1964 in addition to sizeable imports of livestock products, vegetable oils, and feedgrains. In spite of development programs underway even larger food imports will be required in the future to maintain present consumption levels.

As a part of a larger research program of the U.S. Department of Agriculture to determine market potentials for United States agricultural products in the European Economic Community and to analyze the effects of changing agricultural policies and programs of the EEC on exports of U.S. agricultural products, a contract study was conducted to analyze the production potential for peanuts in Senegal and Nigeria, and palm products in Nigeria and the Congo (Leopoldville) during 1966-1975, and the resulting effects on U.S. exports of oilseeds and oilseed products to countries of the EEC.

E. Far East

The Branch published a comprehensive report on the agricultural situation in 1964 in countries of the Far East, Communist China, and Oceania. It reviewed the general economic situation, agricultural production and policy, the food situation, and agricultural trade of all countries of the region. A separate document was published dealing at length with the agricultural situation and crop prospects in Communist China. Three other studies published during the year have proved to be very timely. They deal with the agricultural economy of Pakistan, the agricultural economy of North Vietnam, and the agriculture and trade of the Southeast Asia rice bowl countries. In addition, an article published in Foreign Agriculture spelled out new developments in the expansion of agriculture in western Australia.

Manuscripts completed or nearly completed but not published include a comprehensive study of competition in the Japanese market, a major study of agricultural production and food needs in Communist China, and a study of the tea economy of South Asia. Recently begun is a study of the agricultural economy of South Korea.

F. World Agricultural Situation

This report is issued annually in January. Beginning in fiscal year 1963 supplementary reports for the 5 major regions have also been published. This project appraises the outlook for the demand, supply, prices and trade for farm products in the year ahead and disseminates that information for government and public use on a continuing basis. The report of January 4, 1965 showed farm output down 1 percent on a per capita basis, world farm exports continuing to rise, and prices of primary food products having risen slightly.

G. Agricultural Policies of Foreign Governments

The Division, on a continuing basis, analyzes and evaluates changes in the agricultural policy of foreign governments, especially those changes which encourage production and restrict trade. These are reported in circulars and in the regional situation reports. During the past year, the Branches prepared a large number of briefing papers for use by our negotiators in Geneva. In addition, a number of country policy statements, prepared for the Organization for Economic Cooperation and Development (OECD) policy meeting, were reviewed and questions prepared for the U.S. delegate to this meeting.

PUBLICATIONS REPORTING RESULTS OF USDA RESEARCH

Western Hemisphere

Coyner, Mary S. The Agriculture and Trade of Costa Rica, 1964. U.S. Dept. Agr. ERS-Foreign 102, 30 pages.

Sanderson, Agnes G. Notes on the Agricultural Economies of Dependent Territories in the Western Hemisphere, 1965. U.S. Dept. Agr. ERS-Foreign 136, 80 pages.

Western Hemisphere Branch, Foreign Regional Analysis Division. The 1965 Western Hemisphere Agricultural Situation, 1965. U.S. Dept. Agr. ERS-Foreign 113, 67 pages.

Western Europe

West European Branch. The 1965 Western Europe Agricultural Situation, 1965. U.S. Dept. Agr. ERS-Foreign 114, 88 pages.

Eastern Europe

East European Branch, Foreign Regional Analysis Division. The 1965 Eastern Europe Agricultural Situation, 1965. U.S. Dept. Agr. ERS-Foreign 115, 54 pages.

Brown, G. Stanley. U.S. and Russian Agriculture--A Statistical Comparison, 1965. U.S. Dept. Agr. ERS-Foreign 127, 7 pages.

Severin, R. Keith. Bulgaria's Agricultural Economy in Brief, 1965. U.S. Dept. Agr. ERS-Foreign 136, 12 pages.

Africa and Middle East

Africa and Middle East Branch. The 1965 Africa and West Asia Agricultural Situation, 1965. U.S. Dept. Agr. ERS-Foreign 117, 91 pages.

Moncure, Robert C. South Africa's Agricultural Economy in Brief, 1964. U.S. Dept. Agr. ERS-Foreign 103, 8 pages.

Santmyer, Carolee. Algeria's Agricultural Economy in Brief, 1965. U.S. Dept. Agr. ERS-Foreign 131, 8 pages.

Skinner, Snider W. The Congo's Agricultural Economy in Brief, 1965. U.S. Dept. Agr. ERS-Foreign 121, 8 pages.

Treacle, H. Charles. The Agricultural Economy of Iraq, 1965. U.S. Dept. Agr. ERS-Foreign 125, 74 pages.

Warren, Cline J. The Agricultural Economy of the United Arab Republic (Egypt), 1964. U.S. Dept. Agr. Foreign Agricultural Economic Report No. 21, 57 pages.

Warren, Cline J. and Santmyer, Carolee. Agriculture in Northern Africa, 1965. U.S. Dept. Agr. ERS-Foreign 128, 56 pages.

Far East

Chugg, Boyd A., Agriculture in the Southeast Asian Rice Bowl and its Relation to U.S. Farm Exports, 1965. U.S. Dept. Agr. Foreign Agricultural Economic Report No. 26, 61 pages.

Far East Branch, Foreign Regional Analysis Division. The 1965 Far East, Communist China, Oceania Agricultural Situation, 1965. U.S. Dept. Agr. ERS-Foreign 116, 68 pages.

Hall, William F., Agriculture in Pakistan, 1965. U.S. Dept. Agr. ERS-Foreign 129, 27 pages.

Larsen, Marion R., Agricultural Economy of North Vietnam, 1965. U.S. Dept. Agr. ERS-Foreign 123, 37 pages.

Larsen, Marion R., The Agricultural Situation and Crop Prospects in Communist China 1964, 1964. U.S. Dept. Agr. Foreign Agricultural Economic Report No. 20, 10 pages.

World

Foreign Regional Analysis Division. The World Agricultural Situation, 1965. U.S. Dept. Agr. Foreign Agricultural Economic Report No. 22, 40 pages.

Brown, Lester R. Increasing World Food Output, Problems and Prospects, 1965. Foreign Agricultural Economic Report No. 25, 140 pages.

AREA NO. 3 - QUANTITATIVE EVALUATION OF FOREIGN PRODUCTION,
UTILIZATION AND TRADE IN FARM PRODUCTS

Problem. For appraisal of prospects for U.S. exports of farm products, the great mass of statistical detail regarding foreign production, utilization and trade must be summarized and evaluated in the form of a few statistical indicators. One indicator is a series of indices of agricultural production. Other indicators are total value of agricultural trade, U.S. share of trade, and competitors' shares. Indicators of the adequacy of the food supply in foreign countries are derived from food balances: total calories per person per day, grams of protein per person per day, etc. Preparing such indices, trade tables, and food balances requires first a careful examination of the basic data for internal consistency and for comparability from country to country or commodity to commodity.

USDA PROGRAM

The Department has for many years conducted a program to improve the statistical indicators used in its long-term projections, competition and demand studies and other foreign agricultural research. This activity has involved 11 professional man-years annually.

Two types of analyses are made which test the statistical data for quality and consistency and at the same time result in useful measures of the agricultural situation abroad. To measure trends in agricultural production in each of about 100 countries and to compare their rates of growth, the Department each year computes index numbers of agricultural production.

To assess the size and quality of the food supply in foreign countries the Department also prepares food balances for about 90 countries.

The program also includes the compilation and analysis of data on agricultural trade in geographic areas where trade statistics are of special significance to U.S. export prospects, or where official data are inadequate.

PROGRESS IN USDA AND COOPERATIVE PROGRAMS

A. Production indices

In the period under review indices of agricultural production in 1963 were completed for 101 countries and work has been started on indices for 1964. Under a contract between AID and FDT Division, a statistical analysis of livestock production for 15 countries was begun and largely finished. The analysis included critical evaluation and revision of estimates of livestock numbers, slaughter, and meat production; preparation of livestock balances; and calculation of indices of livestock output net of feed allowances.

B. Food Balances

Food balances for 52 countries were published in 1963-64, with detailed data on food supplies for the 1959-61 average and summary data for 1956-58. Similar food balances for 38 additional countries were published this year. In addition, food balances for 74 countries were published, with detailed data on food supplies for 1970.

C. Trade

A circular was published which analyzed recent U.S. agricultural trade with Western Hemisphere countries and the underlying factors. Circulars were prepared which analyzed the foreign agricultural trade of Bulgaria and the Soviet Union, and a circular analyzing Soviet grain imports.

PUBLICATIONS REPORTING RESULTS OF USDA RESEARCH

Production indices

Africa and Middle East Branch, Foreign Regional Analysis Division. Indices of agricultural production in 10 Near East countries, Dec. 1964. U.S. Dept. Agr. Economic Research Service, 15 pages.

Africa and Middle East Branch, Foreign Regional Analysis Division. Indices of agricultural production in 28 African countries, Dec. 1964. U.S. Dept. Agr. Economic Research Service, 31 pages.

Far East Branch, Foreign Regional Analysis Division. Indices of agricultural production for Australia and New Zealand, Jan. 1965. U.S. Dept. Agr. Economic Research Service, 4 pages.

Far East Branch, Foreign Regional Analysis Division. Indices of agricultural production for the Far East and South Asia, Dec. 1964. U.S. Dept. Agr. Economic Research Service, 21 pages.

Western Hemisphere Branch, Foreign Regional Analysis Division. Indices of agricultural production for 20 Latin American countries, Dec. 1964. U.S. Dept. Agr. Economic Research Service, ERS-Foreign 44 (rev.), 30 pages.

Food balances

Africa and Middle East Branch, Foreign Regional Analysis Division, Food balances for 30 countries in Africa and West Asia, 1959-61, March 1965, U.S. Dept. Agr. Economic Research Service, ERS-Foreign 119, 33 pages.

East European Branch, Foreign Regional Analysis Division. Food balances for 8 East European countries, 1959-61, May 1965. U.S. Dept. Agr. Economic Research Service, ERS-Foreign 124, 16 pages.

Africa and Middle East Branch, Foreign Regional Analysis Division. Food balances for 30 countries in Africa and West Asia, projected 1970, March 1965. U.S. Dept. Agr. Economic Research Service, supplement 3 to Foreign Agricultural Economics Report No. 19, 30 pages.

East European Branch, Foreign Regional Analysis Division. Food balances for 8 East European countries, projected 1970, undated. U.S. Dept. Agr. Economic Research Service, supplement 2 to Foreign Agricultural Economics Report No. 19, 8 pages.

Far East Branch, Foreign Regional Analysis Division. Food balances for 12 countries in the Far East and Oceania, projected 1970, undated. U.S. Dept. Agr. Economic Research Service, supplement 4 to Foreign Agricultural Economics Report No. 19, 12 pages.

Western Hemisphere Branch, Foreign Regional Analysis Division. Food balances for 24 countries of the Western Hemisphere, projected 1970, undated. U.S. Dept. Agr. Economic Research Service, supplement 1 to Foreign Agricultural Economic Report No. 19, 24 pages.

Line Project Check List -- Reporting Period October 1, 196 to September 30, 196

Work & Line Project Number	Work and Line Project Titles	Work Locations During Past Year	Line Project Included in	
			Summary of Progress	Area
FRA 1	Long-range outlook for U.S. farm exports	Washington, D.C.	Yes	Area 1
-1	World food budget, by country and region	Washington, D.C.	Yes	
-2	Projection of exports leading U.S. farm commodities	Washington, D.C.	Yes	
-3	Long-term projections of foreign supply and demand for agricultural products by country, region and for the world	Washington, D.C.	Yes	
-4	Long-term projections of foreign supply and demand for agricultural products by country in the Western Hemisphere	Washington, D.C. and visits to contractors in Western Hemisphere	Yes	
S8-FRA-1	Long-term projections of supply for selected agricultural products in Peru	Lima, Peru	Yes	
FRA 1-5	Long-term projections of foreign supply and demand for agricultural products by country in Western Europe	Washington, D.C. and visits to contractors in Western Europe	Yes	
E4-FRA-1	Belgium: Projections of the supply, demand for, and trade of agricultural products in 1970 and 1975	Antwerp, Belgium	Yes	
*E7-FRA-1	Long-term projections of supply, demand for, and trade of agricultural products in 1970, 1975, and 1980 in Denmark.	Aarhus, Denmark	Yes	
*E29-FRA-1	Updating of the projections of the supply of, demand for, and trade of agricultural products in 1970, 1975 and 1980 in the U.K.	Oxford, England	Yes	
FRA 1-6	Long-term projections of foreign supply and demand for agricultural products by country in Africa and the Middle East	Washington, D.C. and visits to contractors in Africa and the Middle East	Yes	Area 2
F4-FRA-1	Long-term projections of supply and demand for selected agricultural products in the United Arab Republic	Cairo, United Arab Republic	Yes	
F15-FRA-1	Long-term projections of supply and demand for selected agricultural products in the Republic of South Africa	Cambridge, Mass.	Yes	
A22-FRA-1	Long-term projections of supply and demand for selected agricultural products in Turkey	Istanbul, Turkey	Yes	
FRA 1-7	Long-term projections of foreign supply and demand for agricultural products by country in the Far East and Oceania	Washington, D.C. and visits to contractors in the Far East and Oceania	Yes	
A25-FRA-1	Long-term projections of supply and demand for selected agricultural products in the total area of the Crown Colony of Hong Kong	Kowloon, Hong Kong	Yes	
01-FRA-1	Long-term projections of supply of and demand for selected agricultural products in Australia	Clayton, Victoria, Australia	Yes	
FRA 2	Foreign competition and demand by country and region	Washington, D.C.	Yes	
-1	Foreign competition and demand, Western Hemisphere	Washington, D.C.	Yes	
-2	Foreign competition and demand, Western Europe	Washington, D.C.	Yes	

Work & Line Project Number	Work and Line Project Titles	Work Locations During Past Year	Line Project Included in	
			Summary of Progress	Area
FRA 2				
-3	Foreign competition and demand, Eastern Europe	Washington, D.C.	Yes	Area 2
-4	Foreign competition and demand, Africa and Middle East	Washington, D.C.	Yes	
FX1-FRA-1	Effect of oilseed production potential in Nigeria, Congo (Leopoldville), and Senegal on United States exports to the European Economic Community	Edmonton, Alberta, Canada	Yes	Area 3
FRA 2-5	Foreign competition and demand, Far East	Washington, D.C.	Yes	
-6	World agricultural situation	Washington, D.C.	Yes	
-7	Agricultural policies of foreign countries	Washington, D.C.	Yes	
FRA 3-	Quantitative evaluation of foreign production, utilization, and trade in farm products	Washington, D.C.	Yes	Area 3
-1	Food balances for foreign countries	Washington, D.C.	Yes	
-2	Improving statistical tables of trade in agricultural products by foreign countries	Washington, D.C.	Yes	
-3	Annual indices of agricultural production in foreign countries	Washington, D.C.	Yes	

*Documentation of line projects in progress.

